

# Proposed Superannuation Declaration Form



## Declarant Details

Name	<input type="text"/>	
Firm	<input type="text"/>	
Contact Number	<input type="text"/>	Email <input type="text"/>
Role:	<input type="checkbox"/> Accountant <input type="checkbox"/> Financial Planner / Adviser	

I confirm I act as the Accountant / Financial Planner for:

SMSF Name	<input type="text"/>
Member's Name	<input type="text"/>

We have discussed the member's SMSF investment strategy and confirm they will be contributing an additional \$  per:

Week  Fortnight  Month

as part of this strategy.

## Division 293 Tax Declaration

Is the member subject to Division 293 tax?

Yes  No

If Yes, please complete the following:

The member is aware they may be subject to additional tax payable due to their level of contributions or exceeding income thresholds.

I confirm in my discussions with the member that the additional tax will be paid by:

The member's own money  Releasing money from super

## Member's Name Acknowledgement & Signature

I  acknowledge the above declaration and confirm my understanding of the contribution strategy and any potential tax implications.

Signature

Date  /  /

## Declarant (Accountant/Financial Planner/Financial Advisor) Acknowledgement & Signature

I  confirm the above declaration and my role in advising the member regarding their proposed superannuation contributions.

Signature

Date  /  /